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## Argentina

### Citrus Semi-annual

2013

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**Report Highlights:**

Marketing Year (MY) 2012/2013 lemon production is forecast to decrease 1.3 MMT due to a drought during the summer of 2013 while exports remain stable and domestic consumption drops to 65,000 MT. Orange production is expected to increase to 400,000 MT and exports are forecast to decrease significantly to 20,000 MT, compared to 85,000 MT in MY 2011/2012, due to strong competition from South Africa and smaller production than the previous year. Orange consumption is also up 300,000 MT. Tangerine production is expected to increase to 230,000 MT and exports are expected to rebound to 80,000 MT as a result of larger production and strong international demand. Consumption is projected to remain unchanged at 120,000 MT. Grapefruit production is estimated to remain stable at 80,000 MT while exports drop to 2,000 MT and consumption drops to 45,000 MT as more fruit will be devoted for processing and demand shrinks both domestically and internationally.

**Executive Summary:**

For 2012/2013, fresh lemon production is estimated to decrease to 1.3 MMT due to a severe drought during the summer of 2013, which affected fruit size and quality. Lemon exports will remain stable from official estimates at 265,000 MT, and domestic consumption will decrease to 65,000 MT as a result of smaller production.

Fresh orange production was revised up to 400,000 MT, and exports are expected to decrease to 20,000 MT, down 65,000 MT from the previous year, due to strong competition from South Africa and smaller production than the previous year. Orange consumption is estimated to increase to 300,000 MT due to larger production and smaller exports.

Fresh tangerine production was revised up to 230,000 MT. Tangerine exports are projected to increase to 80,000 MT from official estimates due to larger production and strong international demand from export markets. Tangerine consumption will remain unchanged at 120,000 MT.

Grapefruit production is estimated to remain stable at 80,000 MT, and exports are expected to go down to 2,000 MT. Grapefruit consumption will decrease to 45,000 MT, primarily due to less demand for this type of fruit.

**Commodities:**

Lemons, Fresh

Oranges, Fresh

Tangerines/Mandarins, Fresh

Grapefruit, Fresh

**Production:**

For MY 2012/2013, fresh lemon production is revised down to 1.3 MMT from official USDA estimates due to a severe drought during the summer of 2013, which affected fruit size and quality. For MY 2011/2012, fresh lemon production remained unchanged at 1.3 MMT. The fruit quality was excellent as a consequence of the drought of January-March 2012 since dry weather favors plant health conditions. In addition, harvest was delayed about 40 days due to excess rains at the beginning of the harvesting season (March-April). This was an advantage to Argentine lemons since the fruit arrived in Europe in May, when Spain had already sold most of its fruit, leaving Argentine lemons with no competition. Main lemon varieties grown in Argentina are Genova and Eureka (Source: Federcitrus).

Fresh orange and tangerine production for MY 2012/2013 is estimated at 400,000 MT and 230,000 MT, respectively. Although Post's numbers reflect an upward revision from USDA's official numbers, production is down from the previous year due to the effects of the severe frosts of early June 2012. It is estimated that the plants will not fully recuperate until 2014. Fresh orange and tangerine production for MY 2011/2012 remained unchanged from official estimates at 565,000 MT, and 290,000 MT, respectively. Production for oranges and tangerines decreased drastically from the previous year due to the drought, followed by the frost of June 2012. The main orange varieties grown in Argentina are: Navetina, Salustiana, Washington Navel, Navel Late, Valencia Seedless, and Valencia Late; main tangerine varieties: Clementina, Clemenvilla, Ellendale, Malvasio, Montenegrina, Murcott, and Ortanique (Source: Federcitrus). Overall, the citrus sweet varieties that have been expanding faster are seedless varieties, such as Tango for oranges, and Clementines and Clemenules for tangerines.

Grapefruit production for MY2012/13 is forecast to remain unchanged at 80,000 MT. For MY2011/12, production is estimated at 100,000 MT, down 60,000 MT from the previous year as area planted to grapefruit is going down and being replaced with sugar cane and soybeans. In addition, area devoted for grapefruit production has been decreasing in the past few years due to less global demand for this type of fruit. The main grapefruit varieties grown in Argentina are: Marsh Seedless, Star Ruby, and Red Ruby (Source: Federcitrus).

One of the main concerns affecting the citrus sector in Argentina continues to be increasing production costs in the past five years (especially, labor, inputs, energy, inland and ocean freight), as a result of a high inflation rate (between 20-25 percent, and estimated at over 25 percent for 2013) which, combined with the relatively stable value of the official dollar, represents a significant loss of competitiveness for local exporters. (The salary increase reached 21 percent in 2012 and in 2013, it was agreed upon 23 percent with the lemon sector, and about 24 percent with the sweet citrus sector. Additional adjustments will be made by the end of the season). Intermittent strikes by both SENASA and customs inspectors have disrupted trade over the past few years.

During the past few years, the Government of Argentina (GOA) reduced gas supplies to major industrial operations in the country to assure household gas supplies during winter (months of May to September). Gas is mostly used in lemon processing during this period, when lemon processing plants are in full operation. In the Province of Tucuman, main lemon growing region in the country, gas supplies were significantly reduced in the past and the government has announced new reductions in the next winter season. Gas supplies are expected to continue to be scarce as no major gas investments are being planned to overcome this energy problem. The Governor of Tucuman Province requested that the province be exempted from gas rationing during the processing season. Although this is becoming an increasingly serious problem, so far, the local industry has not been significantly affected. A few of the leading lemon industries have developed operations which recycle industry waste into gas. However, the industry is far from becoming self-sufficient in gas supplies.

#### *Area Planted:*

For MY 2012/2013, area planted to lemons is estimated at 49,500 ha, in-line with USDA official estimates. Area has increased slightly from the previous year and it is expected to continue to expand marginally, especially in the Provinces of Salta and Jujuy. Lemon production used to compete with sugar cane production in the Province of Tucuman. However in the past few years this trend has slowed despite the challenges in the sugar cane and bioethanol industries. Currently, ethanol producers are facing environmental contamination issues, and the sugar industry has not been making significant investments due to the decrease of international sugar prices and high production costs. Lemon production also competes, although to a lesser extent, with urban expansion and soybean production, which has grown in marginal areas. According to private sources, the Argentine lemon sector is not expected to expand significantly through land investment but through the incorporation of new genetic material, which would improve yields.

For MY 2011/2012, Post decreased area planted to oranges and tangerines to 43,700 hectares and 32,700 hectares, respectively. According to the National Institute of Agricultural Technology (INTA in Spanish), severe frosts in the main sweet citrus growing region of the country destroyed citrus plants that will not be replaced. Moreover, the economic and financial crisis makes the business less profitable to the citrus sector reducing investment in land and plant replacement. The overall trend is that, most of the area in northeastern Argentina (NEA) where damaged citrus trees were removed and will not be replaced, will be devoted for forestation. The area in northwest Argentina (NOA) where orange and grapefruit trees are not being replaced is being devoted for sugar cane and soybean production. Area planted to grapefruit is projected to decrease to 6,200 hectares in MY2011/2012 and it is expected to go down to 6,150 hectares in MY 2012/2013, as grapefruit production competes with other more profitable crops.

#### *Processing:*

For MY 2012/2013, fresh lemon for processing is projected at 970,000 MT, 125,000 MT smaller than USDA official estimates, due to smaller production. Fresh lemon for processing in MY 2011/2012 remained stable at 963,000 MT. Many producers chose to harvest smaller-sized fruit, which were devoted for processing, leaving larger sizes in the plants to obtain fruit suitable to the needs of more demanding export markets.

Fresh oranges for processing in MY 2012/2013 are increased to 80,000 MT, up 10,000 MT from official estimates, as a result of larger production and smaller exports. Fresh tangerine for processing is forecast to decrease to 30,000 MT due to larger exports, and fresh grapefruit for processing is expected to increase to 33,000 MT as a result of a decrease in domestic consumption and exports. For MY 2011/2012, orange, tangerine, and grapefruit for processing remained unchanged from official estimates at 105,000 MT, 40,000 MT, and 42,000 MT, respectively.

Over 50 percent of total lemon production in Argentina is processed by four plants, of which three are located in the Province of Tucuman, and one in the Province of Salta. In addition, there are about 35 high-tech packing citrus plants which are approved for export by the Argentine sanitary authorities.

*Investment:*

Investment in land devoted for lemon production is expected to continue to expand marginally, especially in the Provinces of Salta and Jujuy. In addition, two new packing and processing plants became operational in 2012 in Tucuman. Investment is due to the potential opening of significant export markets for fresh lemons and the expansion of leading beverage companies in Asia.

Despite the lack of profitability and the domestic economic crisis that the lemon sector is undergoing, larger producers continue to invest in new lemon trees to replace old trees. Tree replacement is carried out at an average annual rate of five percent. Additional investments are being made on fruit packing, packaging, and fractioning machinery.

**Consumption:**

Fresh lemon domestic consumption does not typically vary much over time, unlike oranges and tangerines, which are often substituted by other types of fruit depending on the price. Lemon consumption in MY 2012/2013 is forecast to decrease to 65,000 MT, down 15,000 MT from official estimates, due to smaller production. Consumption in MY 2011/2012 remained unchanged at 70,000 MT.

Fresh orange domestic consumption is projected to increase for MY 2012/2013 to 300,000 MT from official estimates as a result of larger production and smaller exports. Consumption in MY 2011/2012 decreased from official estimates to 375,000 MT as a result of larger exports.

Tangerine domestic consumption in MY 2012/2013 is expected to remain unchanged at 120,000 MT, as larger production than originally expected was offset by larger exports. Consumption in MY 2011/2012 increased to 153,000 MT due to smaller exports.

Grapefruit consumption for MY 2012/2013 is estimated to decrease to 45,000 MT as more fruit will be devoted for processing and demand for this type of fruit is going down both domestically and internationally. Consumption in MY 2011/2012 increased to 57,000 MT due to smaller exports.

Estimated annual per capita citrus consumption is as follows:

Type of Fruit	2010	2011	2012
Lemon	0.74	1.59	1.52
Orange	10.15	16.72	13.40

Tangerine	4.35	7.15	3.81
Grapefruit	1.95	1.82	1.12

Sources: Federcitrus, National Institute of Agricultural Technology (INTA, in Spanish), and Top Info Marketing S.A.

## **Trade:**

### *Exports*

Fresh lemon exports for MY 2012/2013 are forecast to remain unchanged from USDA official estimates at 265,000 MT, despite smaller production. According to private sources, in the Province of Tucuman, it is possible to produce 350,000 MT of premium-quality fresh lemon to supply export markets.

However, the fresh lemon export business is not attractive due to extremely high costs and low competitiveness. This scenario is not expected to change in the near future unless international lemon prices increase significantly, or there is a devaluation of the local currency vis-à-vis the dollar. In addition, the “All Lemon” certification seal that has been developed by the Argentine lemon sector (see Promotion Section) regulates the volume of fresh lemons for export, based on quality, to avoid steep price decreases.

Fresh lemon exports for MY 2011/2012 remained unchanged from official estimates at 267,000 MT. Exports did not increase further as initially expected due to larger fruit sizes, which exceeded the size demanded by most export markets, and also as a consequence of reduced demand in the EU resulting from the economic crisis. Although the harvest was delayed about 40 days due to excess rains at the beginning of the harvesting season (March-April), this eventually became an advantage to Argentine lemons since the fruit arrived in Europe in May, when Spain had already sold most of its fruit, leaving Argentine lemons with virtually no competition.

In addition, following the practice carried out in the past few years, relatively high volumes of fruit were devoted for processing as a result of the decision made by the industry to export only fresh lemons meeting higher quality standards, thus restricting the export supply and preventing a steep decrease of international prices. This market strategy is working very well and expected to continue.

Argentina does not export fresh organic lemons, given that fruit undergoes a bleaching process, which is not allowed under organic certification standards. However, some lemon by-products are produced and exported as organic.

In MY 2012/2013, fresh orange exports are expected to decrease to 20,000 MT, compared to 85,000 MT the previous year (exports went down by half compared to official estimates) due to strong competition from South Africa and smaller production than MY 2011/2012, especially of Navel oranges. Orange exports for MY 2011/2012 increased to 85,000 MT, up 5,000 MT from official estimates, due to smaller consumption.

Tangerine exports for MY2012/13 are forecast to rebound to 80,000 MT from official estimates as a result of larger production and strong international demand. For MY2011/12, exports are down slightly to 97,000 MT as a result of larger domestic consumption and due to lack of competitiveness of the local fruit sector which favored selling the fruit in the domestic market. Moreover, there was larger fruit supply in competing countries.

Grapefruit exports are estimated to decrease slightly to 2,000 MT in both MY2012/13 and MY2011/12. Exports of this type of citrus fruit are negligible and domestic consumption is decreasing as grapefruit consumption is going down globally.

Argentine fresh citrus fruit are exported to over 60 markets. The main export destinations, by volume, in CY 2012 were as follows:

Fresh Citrus Fruit	Destination	Market Share %	
		2011	2012
<b>Lemons</b>	EU	70	70
	Russia	17	15
<b>Oranges</b>	EU	70	58
	Paraguay	19	31
<b>Tangerines</b>	Russia	40	42
	EU	30	26
<b>Grapefruit</b>	EU	86	68
	Russia	7	10

Source: FAS Buenos Aires, based on data from the Global Trade Atlas (GTIS)

For MY 2012/2013, no major export market diversification is expected for citrus fruit. The EU and Russian markets are not expected to expand significantly as no growth in population is projected, thus, demand is forecast to remain stable. In MY 2011/2012, fresh lemon exports to non-traditional markets increased due to reduced fruit supply from South Africa. Although South Africa is a significant challenge for the local lemon sector since it can reach Asia and the Middle East with more competitive prices, Argentine lemon companies are increasingly expanding exports to those non-traditional markets.

The lemon industry is also focused on opening the U.S. market. According to private sources, fresh lemon exports from Argentina to the U.S. would not exceed 20,000-25,000 MT per marketing year, at first. In 2012, the EU remained the largest export market for most types of Argentine citrus fruit: lemons (70 percent market share), oranges (58 percent, from 70 percent in 2011), and grapefruit (68 percent, from 86 percent in 2011); and the second largest market for fresh tangerines (26 percent, from 30 percent the previous year). Russia was the largest market for tangerines accounting for an average of 42 percent of total Argentine tangerine exports. In addition, Russia was the second largest market for lemons and grapefruit, with 15 percent and 10 percent market share, respectively. Paraguay was the second largest export destination for oranges, accounting for 31 percent share. Other markets which increased exports of Argentine lemons were Canada, Ukraine, Saudi Arabia, Hong Kong, United Arab Emirates, Azerbaijan, and Turkey, among others.

#### *Imports:*

Citrus imports are expected to remain negligible in MY 2012/2013. This trend is forecast to continue in the future as Argentina is a net citrus fruit exporting country, and especially with government food import restrictions, which have been in place in the past few years (see Policy Section).

**Policy:***Import and Export Regulations:*

On December 22, 2008, President Cristina Fernandez de Kirchner announced a package of stimulus measures for the Argentine agricultural sector. The measures affecting fruit and vegetables were published in the Official Bulletin, Decrees Nos. 38/2008 and 40/2008, on December 31, 2008. They established that the export tax for pears, apples, peaches, citrus fruit, grapes, blueberries, strawberries, onions, frozen potatoes, beans and pulses were reduced by 50 percent (i.e. fresh deciduous fruit and stone fruit currently pay a 5 percent export tax, while citrus fruit and vegetables pay 2.5 percent).

The changes did not have a significant impact on overall fruit production. Export taxes for these products were already relatively low (5 percent to 10 percent). Part of Argentina's 2.5 percent export tax on citrus is rebated depending on the size of the container.

Export and import tariffs for all citrus types are as follows:

<b>Export and Import Tariffs</b>	
<b>All Citrus Fruit (HTS codes: 080510, 080520, 080540, 080550)</b>	
<b>For countries outside MERCOSUR AREA</b>	<b>%</b>
Import Tariff	10.00
Statistical Tax	0.50
Export Tax	2.50
Export Rebate for cases containing less than 16 kg.	5.00
Export Rebate for cases containing 16–20 kg.	4.05
Export Rebate for cases containing more than 20 kg.	2.70
<b>For countries within MERCOSUR AREA</b>	
Import Tariff	0.00
Statistical Tax	0.50
Export Tax	2.50
Export Rebate for cases containing less than 16 kg.	5.00
Export Rebate for cases containing 16–20 kg.	4.05
Export Rebate for cases containing more than 20 kg.	2.70

Source: FAS Buenos Aires based on data from Tarifar

The Argentine fruit sector is concerned about the numerous trade restrictions and requirements affecting imports which have been instituted by the GOA. These policies hamper producers in acquiring needed production and processing inputs, which must be replaced by locally-manufactured products at higher costs, and have also reduced citrus imports, although imports have traditionally been small. Other measures require preapproval for imports weeks before beginning the importation process. Additional obstacles include the imposition of strict limits on foreign exchange transactions and restrictions against the payment of dividends and repatriation of profits, more widespread usage of non-automatic import licenses, and difficulties in obtaining certificates of country-of-origin for products to be imported.

*Phytosanitary Issues:*

Argentine phytosanitary authorities continue negotiations with China to reopen the market for Argentine fresh lemons. Trade was interrupted in 2005 when China established cold treatment for all citrus fruit,



which damaged the fruit quality. The industry has been focusing on other export destinations pending negotiations with officials in China. Currently, the market is open to fresh “sweet” citrus varieties.

A few citrus diseases are still problematic for Argentine producers, including *Citrus Variegated Chlorosis* (CVC) and *Citrus Greening Disease* (*Huanglongbing* or *HLB*). APHIS has worked with SENASA to develop a Pest Risk Assessment (PRA) and a set of risk mitigation measures to allow the United States to safely import lemons from northwest Argentina, including Tucumán. APHIS and SENASA continue to work to advance this issue; however, APHIS and the U.S. citrus industry are concerned about CVC and how to address the risk of introducing CVC via seeds in commercially imported lemons.

*Citrus Greening*: On July 4, 2012, APHIS/IS Buenos Aires was officially informed that a case of HLB was recently reported in one infected tangerine tree in Puerto Deseado, Province of Misiones (NEA region of Argentina – close to the border with Brazil). The infected tree was destroyed as a precautionary action. In addition, SENASA intensified the surveillance for citrus species in the area with sampling in 150 premises with negative results for both: symptoms and vector (*Diaphorina citri*) of the disease. SENASA stated that, since the location is not a citrus commercial area, and it is surrounded by national parks, it is likely that this was an illegal introduction from Brazil. Based on the above, SENASA still maintains its HLB-free status.

## **Marketing:**

### *Prices:*

#### *International (FOB) Prices for Fresh Citrus Fruit*

Fresh lemon FOB prices during MY 2011/2012 were higher than the previous year as shipments were delayed since the harvest was delayed over a month due to heavy rains. As a result, Argentine lemons entered the European market when Spanish lemons had already been sold out, which increased prices for the Argentine citrus fruit. Prices during the beginning of the marketing season of 2012/2013 continued to increase as a result of less fruit availability in Northern Hemisphere competing countries, such as Spain and Turkey. Overall, fresh orange and tangerine FOB prices were higher and grapefruit prices were lower than the previous year.

The highest FOB price for lemons during 2012 was \$839/MT (March); for oranges, \$492/MT (June); for tangerines, \$908/MT (July); and for grapefruit, \$590/MT (April).

Lemon	FOB Prices (\$/MT)			
	2009	2010	2011	2012
January	713	--	700	--
February	604	--	--	--
March	778	978	915	839
April	589	620	644	688
May	556	671	666	712
June	602	742	689	703
July	633	724	716	705
August	657	783	688	705
September	642	698	679	759

<b>October</b>	566	700	--	--
<b>November</b>	--	667	--	--
<b>December</b>	--	700	--	--
<b>Average</b>	<b>634</b>	<b>728</b>	<b>712</b>	<b>730</b>

Source: FAS Buenos Aires based on GTIS trade data

<b>Orange</b>	<b>FOB Prices (\$/MT)</b>			
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>January</b>	--	--	--	--
<b>February</b>	--	--	--	--
<b>March</b>	--	--	--	--
<b>April</b>	194	155	114	--
<b>May</b>	440	483	495	364
<b>June</b>	494	498	531	492
<b>July</b>	478	471	506	441
<b>August</b>	485	457	519	439
<b>September</b>	455	422	486	400
<b>October</b>	384	381	357	--
<b>November</b>	205	232	116	--
<b>December</b>	--	--	--	--
<b>Average</b>	<b>392</b>	<b>387</b>	<b>391</b>	<b>427</b>

Source: FAS Buenos Aires based on GTIS trade data

<b>Tangerine</b>	<b>FOB Prices (\$/MT)</b>			
	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2012</b>
<b>January</b>	333	1,000	--	--
<b>February</b>	1013	821	894	832
<b>March</b>	785	774	806	818
<b>April</b>	733	763	779	806
<b>May</b>	749	766	818	816
<b>June</b>	760	768	837	826
<b>July</b>	749	771	838	908
<b>August</b>	742	746	842	890
<b>September</b>	721	742	827	838
<b>October</b>	655	695	754	784
<b>November</b>	--	100	--	--
<b>December</b>	--	--	--	--
<b>Average</b>	<b>724</b>	<b>722</b>	<b>822</b>	<b>835</b>

FAS Buenos Aires based on GTIS trade data

<b>Grapefruit</b>	<b>FOB Prices (\$/MT)</b>			
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>January</b>	--	--	--	--
<b>February</b>	1,200	--	--	--
<b>March</b>	598	700	723	--
<b>April</b>	546	546	541	590
<b>May</b>	571	521	525	524
<b>June</b>	533	471	526	503
<b>July</b>	584	478	477	433
<b>August</b>	572	582	600	377
<b>September</b>	513	667	---	212
<b>October</b>	--	--	--	--
<b>November</b>	--	--	--	--
<b>December</b>	--	--	--	--
<b>Average</b>	<b>640</b>	<b>566</b>	<b>565</b>	<b>427</b>

Source: FAS Buenos Aires based on GTIS trade data

#### *Wholesale Prices for Fresh Citrus Fruit*

<b>Lemon</b>	<b>Domestic Wholesale Prices (\$/MT)</b>			
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>January</b>	366	1,020	1,070	800
<b>February</b>	352	1,150	1,166	878
<b>March</b>	350	950	970	800
<b>April</b>	328	680	646	621
<b>May</b>	258	490	436	577
<b>June</b>	222	470	392	491
<b>July</b>	221	460	392	427
<b>August</b>	261	490	375	466
<b>September</b>	357	560	389	470
<b>October</b>	470	660	442	530

<b>November</b>	742	675	555	890
<b>December</b>	737	953	666	1,150
<b>Average</b>	<b>389</b>	<b>773</b>	<b>625</b>	<b>675</b>

Source: Buenos Aires Central Market

<b>Orange</b>	<b>Domestic Wholesale Prices (\$/MT)</b>			
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>January</b>	217	280	308	309
<b>February</b>	229	280	338	322
<b>March</b>	276	340	366	423
<b>April</b>	310	340	448	412
<b>May</b>	298	350	434	396
<b>June</b>	301	320	380	361
<b>July</b>	295	310	345	404
<b>August</b>	299	300	312	410
<b>September</b>	339	280	336	416
<b>October</b>	350	293	380	360
<b>November</b>	373	300	397	390
<b>December</b>	382	313	369	400
<b>Average</b>	<b>306</b>	<b>309</b>	<b>368</b>	<b>384</b>

Source: Buenos Aires Central Market

<b>Tangerine</b>	<b>Domestic Wholesale Prices (\$/MT)</b>			
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>January</b>	n/a	360	422	386
<b>February</b>	n/a	350	366	282
<b>March</b>	n/a	350	331	348
<b>April</b>	296	330	305	285
<b>May</b>	305	330	331	328
<b>June</b>	320	340	352	315
<b>July</b>	332	330	350	313
<b>August</b>	330	310	347	379
<b>September</b>	345	290	340	497
<b>October</b>	400	283	342	460
<b>November</b>	389	295	433	490
<b>December</b>	442	398	369	570
<b>Average</b>	<b>351</b>	<b>301</b>	<b>357</b>	<b>388</b>

Source: Buenos Aires Central Market

Grapefruit	Domestic Wholesale Prices (\$/MT)			
	2009	2010	2011	2012
January	365	510	541	757
February	NA	550	965	769
March	NA	520	793	781
April	403	490	515	670
May	313	440	478	600
June	301	400	473	478
July	306	390	422	435
August	288	370	401	431
September	336	350	380	429
October	340	343	407	440
November	371	440	424	770
December	377	595	576	730
Average	340	450	531	608

Source: Buenos Aires Central Market

#### *Domestic Retail Prices for Fresh Citrus Fruit*

Citrus Fruit	\$/kg
Lemon	1.32
Orange (Navel)	1.13
Orange (Valencia)	1.51
Tangerine (Nova)	1.51
Tangerine (Murcott)	1.51
Tangerine (Dancy)	1.51
Grapefruit (Ruby)	0.95
US\$1 = AR\$5.28 (June 3, 2013)	

Source: FAS Buenos Aires based on supermarket prices

#### *Promotion*

“ALL LEMON Tested & Certified for Export” is the Argentine quality seal which certifies the quality of about 85 percent of lemons devoted for export. Currently, this program, created in 2009, carries out audits of the 16 leading lemon producers and exporters in Argentina. Its primary goal is to develop and establish quality standards to be applied by lemon companies, which are committed to export a strictly selected product. Lemons identified under ALL LEMON parameters must comply with:

- High juice content
- Resistance and durability
- Firmness
- Freshness
- Uniform format
- Balanced color
- Skin in optimal condition
- Traceability and safety.

#### Production, Supply and Demand Data Statistics:

Lemons/Limes, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	48,600	48,600	49,000	49,000	49,500	49,500
Area Harvested	45,000	45,000	45,500	45,500	46,000	46,000
Bearing Trees	14,000	14,000	14,500	14,500	14,500	14,500
Non-Bearing Trees	1,000	1,000	1,000	1,000	1,000	1,000
Total No. Of Trees	15,000	15,000	15,500	15,500	15,500	15,500
Production	1,550	1,550	1,300	1,300	1,450	1,300
Imports	1	1	0	0	0	0
Total Supply	1,551	1,551	1,300	1,300	1,450	1,300
Exports	255	255	267	267	265	265
Fresh Dom. Consumption	85	85	70	70	80	65
For Processing	1,211	1,211	963	963	1,105	970
Total Distribution	1,551	1,551	1,300	1,300	1,450	1,300

HECTARES, 1000 TREES, 1000 MT

Oranges, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	48,900	48,900	48,500	43,700	48,000	43,700
Area Harvested	46,500	46,500	47,000	42,000	46,500	42,000
Bearing Trees	23,000	23,000	22,800	20,500	22,500	20,500
Non-Bearing Trees	2,000	2,000	1,950	1,750	1,900	1,750
Total No. Of Trees	25,000	25,000	24,750	22,250	24,400	22,250
Production	850	850	565	565	340	400
Imports	1	1	0	0	0	0
Total Supply	851	851	565	565	340	400
Exports	125	125	80	85	40	20
Fresh Dom. Consumption	560	560	380	375	230	300
For Processing	166	166	105	105	70	80
Total Distribution	851	851	565	565	340	400

HECTARES, 1000 TREES, 1000 MT

Tangerines/Mandarins, Fresh Argentina	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Apr 2011		Market Year Begin: Apr 2012		Market Year Begin: Apr 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	35,600	35,600	35,200	32,700	34,700	32,700
Area Harvested	33,500	33,500	34,000	32,000	33,500	32,000
Bearing Trees	18,000	18,000	17,800	16,500	17,500	16,500
Non-Bearing Trees	2,000	2,000	1,950	1,800	1,900	1,800
Total No. Of Trees	20,000	20,000	19,750	18,300	19,400	18,300
Production	450	450	290	290	200	230
Imports	0	0	0	0	0	0
Total Supply	450	450	290	290	200	230
Exports	115	115	100	97	45	80
Fresh Dom. Consumption	190	190	150	153	120	120
For Processing	145	145	40	40	35	30
Total Distribution	450	450	290	290	200	230

